



Social Media Ads Response Procedure

1. Receive Short Form Information in Facebook Ads Manager or from PIC .
2. Store Short Form Information in Customer Relationship Management system (CRM).
3. Send immediate first response email that includes:
 - i. Introduction as an agent
 - ii. Inform you will contact them via 1. phone and/or 2. Email in the next 48 hours to follow up on their request.
4. Provide thorough contact information, including:
 - i. Phone
 - ii. Email address
 - iii. E-commerce Store
 - iv. Twitter Brace
 - v. Facebook page
5. Mention that if they need to contact you via any one of these channels before you do so, they are welcome to do it.
6. Attach a valuable document pertinent to the topic:
 - i. Medicare Advantage:
 1. Medicare & You 2020
 2. Your Guide to Medicare Preventive Services
 3. A quick Look at Medicare
 - ii. ACA – Obamacare
 1. A Roadmap to Better Care and a Healthier You
 - iii. Final Expenses
 1. If you captured DOB, attach quote for \$ 10,000 of face amount.
7. Tell them you will explaining attached document in next contact.